



REVIEW AND VALIDATE QUOTATIONS

MFG

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to **review and validate quotations** in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process for reviewing and validating quotations in NCFS.

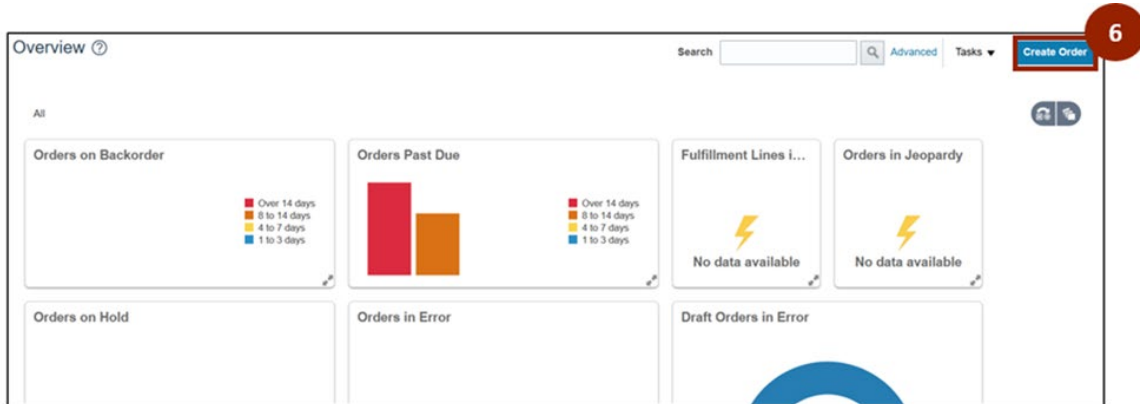
Review and Validate Quotations

1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password**.
4. On the **Home** page, select the **Order Management** tab.
5. Click **Order Management App**.



Note: The **Order Management Overview** screen displays information visually, providing data for DAC. As orders are created and progress, the diagrams and values will populate on this screen. If it is a new instance, this screen displays with minimal information.

6. Click the **Create Order** button.



Note: To create a quotation, follow the steps outlined in the MFG-29 Entering Manual Orders QRG. Be sure to set the *Order Type* field to **Quotation**. Once the quotation has been created, continue with the steps below to review and validate the quotation details.

Once you are on the **Create Order** screen, the process for creating a quotation follows the same consistent approach used for other order types. The screen layout, header fields, and tabs remain the same. The Primary distinction is in the *Order Type* field, which in this case is set to **Quotation**.

Order: ADMIN OFFICE OF THE COURTS - 268 - Processing ⓘ

Total: 3,990.00 Actions ▼

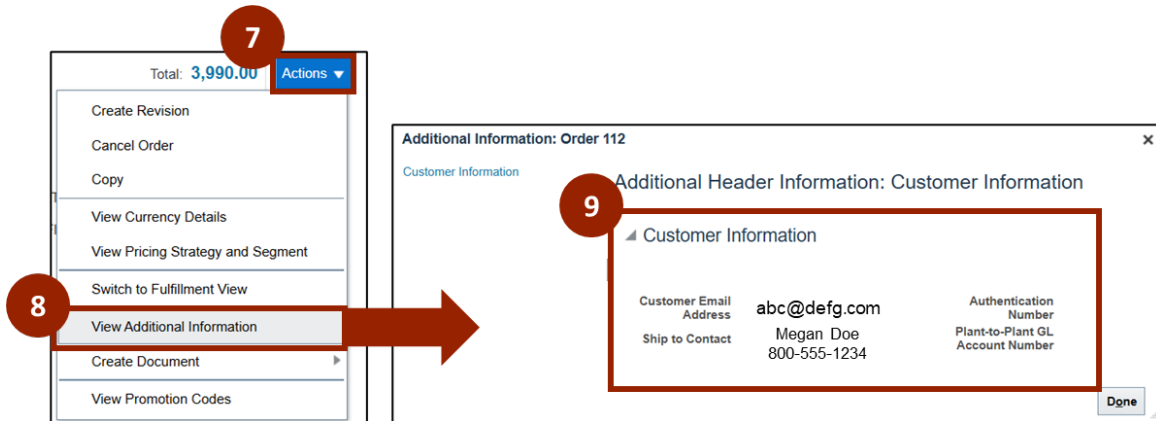
Currency = US Dollar

Customer	ADMIN OFFICE OF THE COURTS (560671)	Business Unit	5200 DEPARTMENT OF ADULT CORRECTION
Contact	F001177_AP	Bill-to Customer	ADMIN OFFICE OF THE COURTS
Contact Method	Testing +AccountsPayable@nccourts.org	Bill-to Account	F116337
Ordered Date	7/31/25 10:27 AM	Ship-to Customer	ADMIN OFFICE OF THE COURTS
Purchase Order	PO-E2E-SCN-004	Ship-to Address	F901 CORPORATE CENTER DR, GENERAL SERVICE DIVISION, RALEIGH NC, 276075045, WAKE, US
Order Type	Quotation	Sales Credits	
		Sales Agreement	

After submission, validate details from the *Additional Information* fields and the **Order Lines** tab attachments.

7. From the **Order** screen, click the **Actions** drop-down.
8. Select **View Additional Information**.

9. Review the displayed information in the *Additional Information* fields.



10. Navigate to the **Order Lines** tab to validate attachments.

Order Lines ?			
Return Show All			
View Freeze Detach			
	Item	Status	Quantity
1	0021152 - STREET NME LETTR #1 1SD 36X	User Action Required	6
2	0020694 - STREET NME LETTR #1 1SD 42X	User Action Required	10
3	0019943 - STREET NME LETTR #1 1SD 48X	User Action Required	4

Price Adjustment: Your Price

To validate the price adjustment of the order line using the *Your Price* column, follow these steps:

1. Click the **Your Price** icon.

Order Lines ?			
Return Show All			
View Freeze Detach			
	Item	Status	Quantity
1	0021221 - CHAIR, BLESSHR, TASK, HEAD REST, AD AR (UN2100D) MF SPA BLK	User Action Required	1
2	0021221 - CHAIR, BLESSHR, TASK, HEAD REST, AD AR (UN2100D) ME SPA BLK	User Action Required	1

2. In the **Sale Price** window, verify the **displayed information**.
3. Click **Done**.

Note: If the **Your Price** icon is not visible, no price adjustments have been done on the line.

Sale Price: Line 1

Price Adjustments

	Type	Amount	Basis	Reason	Adjustment
1	Price override	600		Price match	65
2	Markup Percent (N/A f...	10	Your Price	Other	60
3	Discount Percent (N/A ...	5	Your Price	Sales negotiation	-33

List Price 535

Automatic Adjustments 0

Manual Adjustments 92

Net Price 627

Done

Price Adjustment: Amount

To validate the price adjustment of the **Order Line** using the *Amount* column, follow these steps:

1. Click the **Amount** column link.

Order Lines ?

Return Show All

View Freeze Detach

	Status	Quantity	Your Price	Amount	Line Type
1 - CHAIR, BLESSHR, TASK, HEAD REST, AD AR (UN2100D) MF SPA BLK	User Action Required	1	Sale Price 627	627.00	Buy

2. In the **Amount** window, verify the **displayed information**.
3. Click **Done**

Amount: Line 1 - Sale Price

Price Components	Amount
Base List Price Applied from NCCE Price List	535.00
List Price	535.00
Adjustment for 600USD Price Override for reason code Price match	65.00
Manual Markup of 10% on price element Your Price for reason code Other	60.00
Manual Discount of 5% on price element Your Price for reason code Sales ...	-33.00
Your Price	627.00

Done

Manually Release a Pause

When a quotation is created, the sales order line status is set to **User Action Required**. The quotation in NCFS remains open for 180 days will automatically close after 180 days. To manually close a quotation within 180 days a pause needs to be completed. To manually release a pause, follow these steps:

1. Click the **Actions** drop-down.
2. Click **Switch to Fulfillment View**.

3. Click the **Fulfillment Lines** tab.
4. Click the **Orchestration Process Number** link for the desired order line to be released.

Note: A quotation order type will have two tasks under the **Orchestration Plan** tab.

5. Scroll down to the *Pause – Pause: Details* section to **view additional details**.
6. Click the **Release Pause Task** button to release the pause.

Pause - Pause: Details

Task Name: Pause
Status: Waiting
Jeopardy Score: [blank]
Jeopardy Priority: [blank]
Actual Start Date: 8/25 3:59 PM

Actual Completion Date: [blank]
Planned Start Date: [blank]
Planned Completion Date: [blank]
Required Start Date: [blank]
Required Completion Date: [blank]

Scheduled Start Date: [blank]
Scheduled Completion Date: [blank]
Last Updated Date: 8/25 4:00 PM
Task Release Event: [blank]
Scheduled Release Date: 2/26 3:00 PM

Associated Fulfillment Lines | Status Details | Jeopardy History

Actions: View, View Format, View Fulfillment Details, Freeze, Detach, Wrap

User Request Status	Message Type	Fulfillment Line	Item	Item Description	Ordered Quantity	UCM	Locked	Model	Status	Jeopardy Score	Promised Ship Date	Fulfillment Line Standardized Value	Business Unit	Unit List Price	Unit Selling Price	Mode of Transport	Service Level
1-1		0018920	TRASH CAN HOLDER, ST FRAME...		1	EA...			User Action Req...			910.00 USD	5200 DEPARTM...	910.00 USD	910.00 USD		

Rows Selected: 1 | Columns Hidden: 94

7. A **Confirmation** screen displays confirming that the request was submitted, click **OK** to close.

Confirmation

The request to release the Pause task was submitted. The request may not be immediately completed. Refresh the page periodically to view the status.

OK

The **Orchestration Plan** tab's *Status* column displays the status of the pause.

8. Click the **Refresh** button to monitor the status of the pause.

Note: The system automatically releases the pause and closes the order after 180 days.

Orchestration Process: CustomDOO_QuotationProcess - 300000259983310

Recover Process | Cancel Current Task | View Hold Details | **Refresh** | Done

Customer: GOLDSTON FIRE DEPARTMENT
Customer Registry ID: 561611
Order: 281
Process Transaction Value: 910.00 USD
Process Standardized Value: 910.00 USD
Status: User Action Required
Locked: No

Jeopardy Score: [blank]
Jeopardy Reason: [blank]
Jeopardy Priority: [blank]
Message Type: [blank]
Actual Start Date: 8/25 3:59 PM
Actual Completion Date: [blank]
Planned Completion Date: [blank]

Planned Fulfillment Date: [blank]
Actual Fulfillment Date: [blank]
Required Fulfillment Date: [blank]
Ordered Date: 8/25 3:57 PM
Paused Tasks: Pause

Last Refreshed: 8/25 4:15 PM

Orchestration Plan | Fulfillment Lines

View: Actions | Default | Task Types: All tasks

Task Progress	Task	Status	M	08-04	08-05	08-06	08-07	08-08	08-09	08-10	08-11	08-12
Invoice	Not Applicable											
Pause	Waiting											

Note: Once the pause task has been completed, the **Orchestration Plan** tab's *Status* column displays the status of the pause as **Completed**.

Orchestration Plan		Fulfillment Lines	
View ▼	Actions ▼		Default ▼ Task Types All tasks ▼
Task Progress	Task	Status	M
			Aug 2, '25
			08-04 08-05
	Invoice	Not Applicable	
	Pause	Completed	

Note: Once complete, Click the **Done** button until you return to the **Create Order** screen.

Actions ▼
Refresh
Done

Last Refreshed 8/6/25 4:42 PM

Wrap-Up

NCFS users can **review and validate quotations orders** by following the steps outlined above.

Additional Resources

Instructor Led Training (ILT)

- MFG114 – Manages Sales Order 2